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Advertising Age

50 YEARS 1930-1980

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Most expensive

National Distillers bucks the trend toward lower proof spirits with new Old Grand-Dad Special Selection 114-proof bourbon. Expected to sell in the $15-to-$16 range, the product will be promoted for its "barrel-proof" distinction via ads breaking in August in more than a dozen magazines. Young & Rubicam is the agency.

Why Old Grand Dad Special Selection is the most expensive Bourbon in the world.
OLD GRAND-DAD SPECIAL SELECTION
The most expensive Bourbon in the world.

While U.S. bakes

Cold weather chills European marketing

By CAROLYN PFAFF

PARIS—"Let's hope the heat in Texas will make up for the cold here in France," said a Perrier spokesman commenting on the slump in his sales here after six continuous weeks of rain and cold on the Continent, the most frigid June/July period since 1907.

Across La Manche, Britain isn't faring much better. Equally doused under a cool shroud of mist, fair weather businesses are in the doldrums adding a fraction of woe to Britain's already unstable climate of 2,000,000 unemployed, factory closures, sagging tourist dollars, droopy retail sales, record interest rates, an overvalued pound and 20% inflation.

Thinned tourist ranks, slumping sales in thirst-quenchers, waterlogged agricultural producing areas that will bring higher food prices down the road and declining retail sales—except for a run on rainwear—are all products of this stationary front.

Tourism has been struck a heavy blow in Britain, where the impulsive tourist market—weekends and Sunday trippers—certainly has been rained in, and is a contributory factor to what is expected to be a 20% shortfall in the U.K. tourist trade from last year. The strong pound, to be sure, is far more disastrous than the weather in Britain, where no one comes for a suntan anyway.

All-round tourism, typified by an expected 15% drop in visitors to London, is in bad enough shape to have shaken the British Tourist Authority into plans for a $5,000,000 London-boosting worldwide campaign through Ogilvy & Mather to combat the capital's worsening image (AA, July 14).

▪ But tourists do stream into France, where hotel occupancy is down as much as 50%, the hardest hit being Brittany.

The American Express office in Paris says tourists from America who usually spend an average of

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RJR, PM sue to stop Triumph ads

By SAM HARPER

NEW YORK—R. J. Reynolds Tobacco Co. has joined the fight that archrival Philip Morris U.S.A. began two weeks ago, also filing a suit accusing Loews Corp.'s increasingly aggressive Lorillard division of false advertising.

While it is rare that the nation's top two cigaret marketers see eye to eye, RJR and PM are seeking damages and an injunction against Lorillard on the basis of a month-old advertising campaign that touts its 3mg Triumph cigaret as the winner of what RJR and PM maintain are questionable "national taste tests." The results of the tests, which the PM suit described as "not statistically significant," found Triumph "preferred" over PM's Merit and Marlboro Lights cigaret brands and RJR's Vantage and Winston Lights (AA, June 16).

Though RJR would not comment on the litigation, a company spokesman said there were "parallels" between the RJR and the Philip Morris suits.

PM's suit, filed in federal district court here July 17, claims that the smokers interviewed during Lorillard's taste tests were subject to information that "biased the expression of preference and subsequent taste comparison in favor of Triumph." Ads claim that 60% of the smokers tested preferred Triumph over the 8mg Merit and 62% preferred the 3mg brand over RJR's 11mg Vantage.

The suit also alleges that the number of respondents interviewed was not great enough to justify the ad headline, "Triumph beats Merit." In its suit, PM also noted that Merit has achieved a 3.7% share of market since its introduction in 1976, while Triumph, "despite considerable advertising and promotion, has failed to obtain a 0.5% share" of market. Triumph moved national in June, 1979.

The Lorillard campaign "will, if continued, cause smokers to switch from Merit to and from Marlboro Lights to Triumph, who otherwise would not do so," according to PM.

▪ As a result PM, and presumably RJR, are calling for a halt to the comparison campaign and are seeking "a sum equal to Lorillard's profits from Triumph" since the outset of the campaign. The PM suit adds that the funds accrued from the case would both make up for a loss of customers and be invested in a corrective advertising effort.

Prior to the June startup of its now controversial campaign, Lorillard remained a relatively passive competitor in the ultralow-tar (5mgs tar and under) segment. As RJR's Now, PM's Cambridge and American Tobacco's Carlton this spring fought for "lowest tar" classification, Triumph emphasized taste as its major attribute. This advertising focus gave it a 0.3% market share by the end of 1979, according to John C. Maxwell Jr., senior analyst, Lehman Bros. Kuhn Loeb Research.

While Triumph's year-end growth is considered respectable in an industry inundated with low-tar and ultralow-tar brands, industry analysts speculate that Lorillard felt the need to bring Triumph up to the share level of its year-old Kent III brand, which claimed a 1.4% share of market in its first year.

However, Lorillard's aggressive marketing push has extended beyond Triumph. In a campaign that appeared last week for its 5mg True, the nation's fifth largest cigaret marketer takes aim at brands marketed by RJR, PM and American. While the campaign does not compare products, its headline, "To those of you who will try a 1mg tar cigaret and find it tasteless . . .

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Cable blockbusters beat net tv share: Nielsen data

By MAURINE CHRISTOPHER

NEW YORK—Schedule a film like "Deer Hunter" on the home screen in the rerun month of May, and most viewers hooked up to pay cable will watch it in preference to the repeats on ABC, CBS and NBC.

Furthermore, increasing numbers of people are willing to put out $8 to $11 a month to see movies at home that would cost $5 or more each in theaters.

▪ Once they join the 8,000,000-plus pay cable subscriber list, homes tune in an average of two and one-half movies weekly on the premium pay channels.

"Looked at in terms of today's cost of going out to the movies, viewers who watch and enjoy a couple of movies or so at home weekly would seem to be getting their money's worth from pay cable," said Dwight M. Cosner, the A. C. Nielsen Co. exec in charge of analyzing the research company's cable reports.

▪ The star catv attraction for Nielsen's new May report was Home Box Office's premiere showing of "Deer Hunter." It drew a 41 rating in pay cable homes, just three points below the record set by "Saturday Night Fever" on HBO last February.

In the 5,000,000 HBO homes, the Sunday night (May 18) showing of "Deer Hunter" decimated the commercial networks and a Showtime special.

The network scores were 12 for "One Day at a Time" on CBS, 11 for "CHiPs" on NBC and 8 for "Mysteries of the Sea" on ABC.

Showtime premiered "Deer Hunter" on a Saturday night and also did well against the networks. In Showtime's 1,200,000 homes, the war feature drew a 28 rating compared with four for NBC and eight for CBS. ABC's "Love Boat" hung in there with a 17.

▪ For the first time since Nielsen began counting heads in pay cable, there was one full week—May 15 to 21—during which HBO pulled higher prime time (8 p.m. to 11 p.m., local time) shares in pay ca-

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NEWSPAPER

Designer jeans

3

AA MAR81
DC2001 4CONGL INAGNR 021139200IJ
R HAGERMAN SECY TO SR VP
CONGRESSIONAL INFO SERVICE
7101 WISCONSIN AVE
WASHINGTON DC 20014

last minute news

Gillette to test Silkience skin moisturizer

BOSTON—Gillette Co. will test a new self-adjusting skin moisturizer under the Silkience name within the next six weeks, according to trade sources. A tv campaign via N W Ayer ABH, New York, will support. The new entry follows the launches of Silkience hair conditioner and shampoo, both handled by Advertising To Women, New York.

Max Factor to debut Living Proof skin system

HOLLYWOOD—Norton Simon Inc.'s Max Factor & Co. will introduce Living Proof, 13-item skincare system, in major department stores in New York, Chicago, Detroit and Los Angeles beginning in October. Co-op and national women's magazine ads, heavy sampling and a gift-with-purchase promotion are in the works. "An exciting new concept in hypoallergenic skincare begins" is the ad theme. WRG/West handles.

Ricoh expected to name DKG Advertising

WOODSIDE, N.Y.—Ricoh Corp., makers of 35mm cameras and accessories, is expected to name DKG Advertising, New York, to handle its estimated $2,000,000 to $3,000,000 account. Final approval of DKG is dependent on the agency's acceptance by Ricoh Ltd., Tokyo, the parent company. Ogilvy & Mather/2 is the previous agency.

New Dad's, Bubble Up campaigns due

CHICAGO—IC Industries will launch new campaigns for Dad's root beer and Bubble Up next month to reposition the soft drinks for a younger market. Dad's is dropping its "foams up" pitch for "Dad's—the real root beer lover's root beer." Bubble Up will stress refreshment, calling itself

(Continued on Page 8)

Key issue is new video

Strike perils fall season

By BOB MARICH and COLBY COATES

LOS ANGELES—Actors striking most prime time network tv and theatrical movie production went into the weekend with no talks scheduled with producers, dimming hopes for an early settlement.

A prolonged strike would mean postponement of the new prime time season and the big promotional push that goes with it. But sources say the strike would have to continue another two weeks before the new season start date would be in peril.

Producers were just starting series production when some 60,000 members of the Screen Actors Guild and the American Federation of Television & Radio Artists began the strike last week. About 10 made-for-tv movies and some theatricals made by smaller production companies have been granted waivers by the unions to continue production, but most production has stopped.

Although the job action affects prime time network tv and theatrical features, the contract impasse ironically centers largely around provisions for pay tv, cable tv and home video production—areas that up to now have generated virtually no union work for actors.

The walkout is being compared to a 1960 strike—a five-week job action when SAG's president was Ronald Reagan. Then the main issue was residuals for the emerging practice of broadcasting theatrical movies on tv. Now emerging new media are the major stumbling block in the current strike.

"The outlook [for a settlement] isn't too good at this point," a SAG source said.

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Foote, Cone & Belding showed its "Hometown Pizza Hut" campaign, scheduled to break in early fall, to franchisees during the chain's midyear meeting held last week in Chicago *(see story, Page 82)*. Before the franchisees could decide whether they liked the commercials, the agency extended a welcome to its hometown. (Staff photo by Mary Cairns.)

Schnappy: Ex-Heublein exec Elliot tackles the giants with innovative spirits

By JOHN J. O'CONNOR

NEW YORK—Wine and spirits entrepreneur William V. Elliott is banking on Spritzen, a sparkling white wine, and Rumple Minze, a 100-proof, imported peppermint schnapps, to extend the new product success record he achieved while at Heublein Inc.

The former vp-marketing of Heublein Inc.'s spirits group has officially opened a company bearing his name following a year of planning, developing several new entries and contracting with overseas suppliers.

Mr. Elliott, 49, said that while the entrepreneurial road has been tough and demanding (he logged 15,000 miles of travel in a recent 10-day period), "it's also been very satisfying. Not having to deal with all the politics of Heublein in getting a job done makes all the difference in the world. I don't miss the corporate life at all."

▪ Operating from an office in West Hartford, Conn., no more than a mile away from the spirits group headquarters, Mr. Elliott—with 10 salesmen to start—is attempting to do battle with giant competitors via innovative products like Spritzen, Rumple Minze and nine other undisclosed products he has personally conceived.

Spritzen was recently introduced in San Francisco, supported by a radio campaign created by Flaherty & Co. here.

If Spritzen can make it in a market like San Francisco—"a well-understanding and mature wine market that's heavily into sparkling wines," Mr. Elliott believes the product can make it anywhere.

Promoted as the "waterfall wine," Spritzen is designed to ride the crest of popularity that sparkling wines currently enjoy. As a category, sparkling wines are soon expected to pass the 10,000,000 case mark. Spritzen, imported from Germany, is technically considered a sec, or like champagne. It will retail for $7 a bottle.

But rather than dwell on the

(Continued on Page 83)

Syndie tv wrapup

"Hee Haw," "Donahue," "M*A*S*H" and the Muppets—how are they doing in Cincinnati, Salt Lake City and Birmingham? An update on syndication show rankings in markets 26 through 50 starts on Page 22; tables are on Pages 62 and 64. This study, based on the latest Nielsen measurements, includes top tens for each market.

Raisin growers plan $10 million push

STOCKTON, CAL.—Diamond-Sunsweet and Sun-Maid Growers of California are combining their marketing efforts in an attempt to protect their slipping market shares from competitors like Tenneco West and RJR Foods' Del Monte Corp.

Diamond-Sunsweet, based here, and Sun-Maid Growers, Kingsburg, Cal., have agreed to pool their marketing capabilities with a combined advertising budget topping $10,000,000.

The new organization is expected to be called Sun-Diamond Growers of California, headquartered here. Each of the three members, Sun-Maid, Diamond and Sunsweet, will maintain its own assets and legal identities.

Industry observers say the joint marketing agreement is a necessary step for the fruit and nut cooperatives to remain competitive—or even hold their own—in a category where consumption is rising and competiton is intensifying.

Sun-Maid president Frank Light has been named president of the new group, with Diamond-Sunsweet president William Dabney as exec vp. Donald Soetaert, formerly Sun-Maid's exec vp, has become senior vp-sales and distribution. George Funk, formerly senior vp-marketing and sales, Diamond-Sunsweet, has been named senior vp-marketing.

▪ As for agencies—Doyle Dane Bernbach (Diamond-Sunsweet) and D'Arcy-MacManus & Masius (Sun-Maid)—the new arrangement does not necessarily mean one will be dropped. Mr. Funk told ADVERTISING AGE he does not plan to initiate any major agency changes and is not opposed to the idea of Doyle Dane and D'Arcy continuing as "co-agencies." Sun-Diamond will hold meetings over the next month to work out combined marketing details.

Both Mr. Funk and Mr. Light said the new arrangement will allow Sun-Diamond the advantages of more economical joint distribution and advertising.

This fall, before the joint marketing starts, Sunsweet will begin its first national advertising in more than 10 years, repositioning prunes as "the smart snack."

In an attempt to overcome an "old folks' laxative" image, Sunsweet will spend $1,500,000 in women's magazine advertising stressing the food value of prunes. The drive starts in September.

Diamond, with a $3,500,000 1980-81 advertising budget, will run in women's magazines throughout the year, in addition to running spot tv commercials.

Mr. Funk said the year-round ad schedule is an attempt to extend the walnut-selling season, usually concentrated in the fourth quarter of the year.

▪ Sun-Maid, which has more than 50% of the raisin market, has allotted $1,800,000 of its $5,000,000 1980-81 ad budget to back raisins. Tv and print advertising positions "America's favorite raisin" as a healthy snack food for kids and a cooking ingredient. Nature Snacks' ad spending will reach $700,000 and Sun-Maid Cinnamon Swirl raisin bread will get $2,500,000 in tv and print ad support.

Sources at Tenneco West, the Bakersfield-based marketer of Sun Giant nuts and fruit, said it will increase ad spending well beyond the $3,500,000 levels it reached last year, with a tv ad campaign continuing some of the "Something good under the sun" themes introduced last fall.

▪ The new Sun-Diamond marketing agreement is not without precedent. About 10 years ago, Sun-Maid and Sunsweet tried a similar co-marketing arrangement that failed because of management differences.

Sun-Diamond execs are optimistic that the new arrangement will be different. Unlike the first marketing venture, Sun-Diamond has a single chief executive—Mr. Light. #

highlights

Monday, July 28, 1980

Tv commercial production business exiting Los Angeles has brought action by producers and labor. *See Page 4.*

Life Savers kicks off $5,000,000 effort on behalf of Bubble Yum. *See Page 10.*

DeLorean Motor Co. has decided on a name for its long awaited new car—the DeLorean. *See Page 12.*

Syndication looks healthy in AD AGE analysis of Nielsen May sweeps returns for markets 26 through 50. "Hee Haw" is a big hit. *See Page 22.*

Although financial institutions tend to have a sedate image, banks in the U.K. are going on a promotional binge to attract the "unbanked" populace. *See Page 24.*

Samsonite Corp. seeks market share gains with its $4,000,000 campaign for luggage lines. *See Page 28.*

Anheuser-Busch illustrates the strength merchandising support can lend to a brand at an AD AGE Week session. *See Page 32.*

NBC-TV and S.E.P. Productions are the biggest ad media losers as the Moscow Olympics get under way. *See Page 37.*

War/military fare catches tv viewers' fancy and toy gun sales rise, signaling interest in traditional militarism. *See Page 38.*

JWT's Robert E. (Buck) Buchanan sees a long healthy life ahead for the Big Three tv networks and solid growth for new video forms. *See Page 42.*

General Foods president defends the company's coffee business at its annual stockholder meeting. *See Page 46.*

Leonard J. Reiss offers his "recipe" for creative ad copy and how he acquired it. *See Page 47.*

How do MBAs fare in advertising? Dick Wasserman surveys the field to come up with an interesting answer. *See Page 52.*

Gene Mahany looks at current couponing and sweepstakes promotions to see if they are helping to draw consumers out of a buying apathy. *See Page 55.*

Foreign-language broadcasting in Australia would be expanded and commercialized under legislation introduced by the country's prime minister. *See Page 56.*

Christiane Quenard, one of the top women in French advertising, has been fired following a freewheeling interview she gave to a French advertising magazine. *See Page 57.*

"The !AA must grow in importance, especially in the U.S.," says the group's newly elected president, Mauro Salles. *See Page 58.*

L'Officiel, buffeted by recession winds, cuts back. *See Page 81.*

O&M makes major changes in London. *See Page 81.*

ABC takeover talk is nixed for now, but Wall Street is concerned about all networks' expenses. *See Page 84.*

Section 2

The demographics of suburbia have long been important to advertisers. Among media tailored to this market, suburban press still holds center stage, but cable tv has made a dramatic entrance in some markets and is waiting to do the same in others. Section 2/-Suburban Media focuses on these topics as well as magazines, shoppers and a radio station that found a home in the suburbs, beginning opposite Page 44.

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Agencies profit, but fall short of '78 record

NEW YORK—Last year was a good one for the advertising agency business, though average net profit fell short of 1978, according to a membership survey by the American Assn. of Advertising Agencies.

The average net profit of 4.84% of gross income reported in 1979 was down from the decade record high of 5.09% in 1978. Although the '79 net percentage was second highest for the decade, profit before U.S. income taxes slipped to the lowest since 1975—6.18% of gross income. The tax percentage declined for the fourth straight year *(see chart)*.

▪ Expenses continued to rise as a percentage of gross income in most categories, except for the biggest expense—payroll. Here the figure hit 60.93%, a drop from 61.02% in 1978. The payroll percentage has shown a steady drop through the '70s, from a high of 66.67% in 1970, according to the study.

The Four A's showed separate figures for incorporated agencies. These total more than 90% of Four A's membership, though the number of incorporated agencies among the 265 agencies participating in the survey was not given. The net profit for incorporated agencies last year was 4.59% of gross income, down from 4.74% in 1978. Both figures are below the profit averages for all agencies surveyed.

However, the incorporated agencies showed a growth in net profit as a percentage of billings—1.03% in 1979 and 0.99% in 1978. It's the first time that the figure topped 1%. #

Ten-year record of Four A's member agencies' costs and profits

(Per cent of gross income unless otherwise stated)*

Number of agencies represented	1970 220	1971 215	1972 240	1973 240	1974 230	1975 233	1976 231	1977 240	1978 242	1979 265
Rent, light and depreciation	7.30%	7.81%	7.74%	7.29%	7.37%	7.81%	7.36%	7.13%	7.22%	7.64%
Taxes (other than U.S. income)	2.93	2.98	3.27	3.67	3.81	3.84	3.94	4.05	4.11	4.20
Other operating expenses	15.40	15.86	15.95	15.83	16.20	16.52	16.47	16.61	16.89	16.91
Total payroll	66.67	65.26	64.53	64.37	64.11	63.23	61.86	61.41	61.02	60.93
Payments into retirement plans	1.67	1.87	1.96	1.85	2.03	2.00	2.31	2.80	2.32	2.37
Insurance for employee benefit	0.99	1.14	1.19	1.22	1.23	1.44	1.58	1.59	1.71	1.77
Total expenses	94.96	94.92	94.64	94.23	94.75	94.84	93.52	93.59	93.27	93.82
Profit before U.S. income tax for all agencies	5.04	5.08	5.36	5.77	5.25	5.16	6.48	6.41	6.73	6.18
U.S. income taxes	1.58	1.76	1.60	1.51	1.59	1.28	1.71	1.68	1.64	1.34
Net profit	3.46	3.32	3.76	4.26	3.66	3.88	4.77	4.73	5.09	4.84
Profit before U.S. income tax for incorporated agencies	4.92	4.80	5.42	5.70	5.27	5.43	6.38	6.19	6.58	6.01
U.S. income tax for incorporated agencies	1.81	1.93	1.80	1.83	1.84	1.52	1.86	1.83	1.84	1.42
Net profit for incorporated agencies	3.11	2.87	3.62	3.87	3.43	3.91	4.52	4.36	4.74	4.59
Net profit for incorporated agencies (as percentage of sales — *i.e.*, billing)	0.66	0.56	0.75	0.82	0.65	0.77	0.97	0.95	0.99	1.03

*Gross income comprises commissions, agencies' service charges, and fees. Source: Annual studies of advertising agencies' costs and profits conducted by American Association of Advertising Agencies. Figures are averages for agencies of all sizes.

L.A. tries to stem loss of tv ad production

By BOB MARICH

LOS ANGELES—Convinced that tv commercial business has been heading for other parts of the country, a tv commercial producers' trade group and a technicians' union here are fashioning a recovery program to lure back advertisers and their agencies.

Most notable of the defectors is Procter & Gamble, which is slowly but steadily cutting back on production here because of costs.

"I don't think that there's any question that Los Angeles production is down this year, that there's a big drop in business," said Frank Tuttle, president of the Film Tree, Orloff & Roagan, a tv production house with offices in Los Angeles and New York.

"Part of it is the economy," he said. "But in addition to the economic slowdown, there's been a runaway of some business to New York, Florida and other parts of the country."

▪ Mr. Tuttle is past president of the Assn. of Independent Commercial Producers/West, a trade group that is scheduled to present an "economic impact" study documenting the decline to Los Angeles Mayor Tom Bradley's office Aug. 8. Union representatives also will be on hand.

The hope is that the mayor will take steps to bring back the lost business. Members of a technicians' local union have already reduced their customary minimum to appease producers.

Cay Mohr, recently named AICP/West president, said that a decade-old New York City policy of giving producers free location permits and police and fire services is giving the Big Apple a big edge over Los Angeles, where producers are charged for the same services.

"Location, police and fire isn't the total reason that we're losing production here," said Ms. Mohr, exec vp-producer of Ross, McCanse & Associates, a tv commercial producer. "But these factors are something that is brought up all the time" by agencies and advertisers.

She noted that the firemen New York City provides at no charge will cost a tv producer shooting in Los Angeles brush areas $24.90 an hour plus $100 a day for a fire truck. In addition, regulations covering permits and other areas have become more stringent, she added.

The slide in Los Angeles production is traced to a 1978 memo from P&G to its agencies saying "there's a premium for doing a full production tv commercial shot in a studio in Los Angeles compared to New York," according to Bill Dobson, P&G pr section manager.

▪ The memo asserted that labor costs "all the way up and down the line" are higher in Los Angeles, Mr. Dobson said. P&G has sent its agencies several follow-up memos reminding them that "some justification other than cost" is necessary for having studio shoots in Los Angeles instead of New York, Mr. Dobson said.

Earlier this year, Barney Melsky, president of AIPC/East, compared labor costs of an average commercial shoot in a study presented to the New York City mayor's office that said Los Angeles is 26% more expensive than New York. Los Angeles had higher film processing costs, required a generator accompanied by firemen in more cases, higher union paper work expenses, more stringent child welfare rules and higher location fees for both public and private sites, according to the comparison.

▪ The National Assn. of Broadcast Employees & Technicians Local 531 in Los Angeles—which has jurisdiction over at least half of the tv commercial productions—was "stunned to have such a drop-off" in commercial productions recently, although business has picked up in the last two weeks, said Judy Wester, assistant business representative.

In an effort to attract more production, NABET members voted at a July 12 meeting to reaffirm that they would work for 8-hour daily guarantees instead of 10-hour guarantees, Ms. Wester said. The longer minimum guarantee meant producers who completed a day's work in less than eight hours were obliged to pay crews for 10 hours' work—with the last two hours at time and a half pay.

▪ "The P&G report gave some people ideas that Los Angeles costs more," which is not true, Ms. Wester said.

Meanwhile, Los Angeles city public works commissioner Maureen Kindel said that Mayor Bradley "has become aware of this problem and is committed to stem this tide as far as the city can control it." She added that "many factors," not all related to government, are part of the reported loss in tv commercial production.

She added that the city has responded to producers' needs in the past months by opening a permit office in Hollywood and adding several AICP/West representatives to a 50-person film advisory board that reports to the mayor.

Also, the city recently hired Berkheimer & Kline pr company to communicate the city's efforts on behalf of producers, "urging them not to go away."

▪ Ms. Kindel said that she doesn't feel Los Angeles would eliminate permit, police and fire fees because the city averages 20 to 25 outdoor shoots involving movie, tv and commercial productions daily, and "there's no way we could support that level of activity."

She added that fees are structured to cover costs and are reasonable, such as $125 per day to use city hall as a location. Owners of private property "are becoming greedy" by charging high fees to use their locations, she said. #

Permits tell the story

LOS ANGELES—While tv commercial production has fallen here recently, production activity remains relatively unchanged in New York City.

Comparing tv commercial location permits issued—a measure of outdoor production activity—Los Angeles in June conferred 75 location permits, down 26 from a year ago.

Meanwhile, in New York City, location permits for the first six months of 1980 stood at 441 compared to 447 for the same period in 1979.

Meredith Anthony, assistant to the director of New York's mayor's office for Motion Pictures & Television, attributed the steady production in part to free permit, police and fire services.

She added: "It's taken almost 10 years for it to sink in to the industry. The myth was so prevalent that New York was hard to deal with that it's only in the past few years that it's been erased." #

Arco to push saving at home

LOS ANGELES—Atlantic Richfield Co. here will broaden its energy conservation ad campaign from auto fuel conservation to home energy conservation in a $7,000,000 network tv and national magazine ad push from August through December.

Themed "Conservation, it's the thing to do," the campaign is a new part of Arco's $20,000,000 "energy diet" corporate advertising effort promoting conservation and offering energy-saving tips (AA, Sept. 17). Needham, Harper & Steers handles.

▪ Thirty-second network tv ads on CBS and NBC in prime time, news and other dayparts break Aug. 18. The magazine ads start in *Newsweek* and *Time* during September.

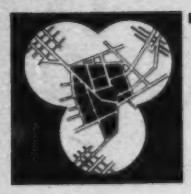
Earlier ads encouraging fuel conservation in automobiles were based on the theme, "It's time we all went on an energy diet."

Arco also has made its first Cable News Network buy via Needham, taking a two-week flight breaking in September promoting the Public Broadcasting Service's science/astronomy "Cosmos" series premiering Sept. 28, which it is largely underwriting. #

corrections & clarifications

• Two high-ranking syndication shows in Minneapolis—"Dance Fever" and "Prisoner: Cell Block H"— are on KSTP-TV. Nielsen top tens were printed with incorrect call letters for that station (AA, July 21, P. 62).

• The name of Marcel Bleustein-Blanchet, founder of Publicis, was earlier misspelled (AA, July 21, P. 2).



Two studies

How the public views shoppers

BY GERALD C. STONE

MEMPHIS—It may be the diversity of nondaily newspapers that has prevented shoppers from receiving serious study.

Or it may be that more traditional papers believe ignoring the free-circulation papers will damage their credibility or (better yet) cause them to go away.

But the shoppers, pennysavers and throwaways are in nearly every city and town and they have proliferated in the suburbs.

Do people read them? Are they regarded as newspapers? Can ads in the shoppers sell goods and services? Are the throwaways any real threat to daily newspapers?

According to recent research, the answer to each of these questions is yes—at least a tentative yes.

Two studies were completed in Southern California and nationally by the Newspaper Advertising Bureau (NAB) in 1977 and 1978, respectively. And, though the approaches were slightly different and the results, therefore, also differed slightly, the general conclusions of these independent studies were the same: Shoppers have an impact on the newspaper reading public.

Roughly, the studies found that the majority of homes do receive a freely distributed newspaper—perhaps 65% to 75% of single family dwelling units; at least half the respondents who said they had access to a shopper also said they read it—59% to 66%; most of the shopper readers also subscribed to and read a daily newspaper; and most of those who said they read the free papers seemed to read them thoroughly or at least skim through them.

Gerald C. Stone is chairman of the Memphis State University department of journalism and editor of the "Newspaper Research Journal."

Reported use of newspaper ads Table 1

Type of paper	% who read ads	% who have placed ads	% who tried to buy from ads in last year
Daily	84%	38%	37%
Free home delivery	48	12	20
Store shopper	n.a.	11	17

Readership of home-delivered papers Table 2

No. of papers received	% who read editorial	% who read advertising	% who read ads and editorial
None	8%	10%	7%
One	57	54	47
Two	60	59	53
Three	58	57	51

Queries to paid-circulation managers Table 3

Questions	% Yes
Are you aware of shoppers or free-circulation papers in your area? Does their presence affect your paper at all?	77%
Do you think they have an effect on your paper's readership?	46
Do they have an effect on your paper's advertising revenue?	77
Do you think your paper is affected by the shoppers available in grocery stores and in racks at other retail stores?	42
Have the shoppers been responsible for any changes in your paper?	23
Is your paper putting out a shopper, or is it financially aligned with a shopper?	31

Other individual findings of the studies: That 48% of residents found free home-delivered papers either useful or very useful; 33% found the home-delivered a nuisance; 41% found the store shoppers either useful or very useful; 48% said they read the ads in home-delivered shoppers compared with 84% who said they read the ads in their daily newspaper; 20% had tried to buy from an ad in a shopper during the past year compared with 37% who had tried to buy from a daily paper.

▪ There are other interesting bits of information from the two studies, but it might be appropriate to say something about how the studies were conducted before going into these details.

The NAB study was a national random sample of 3,048 adults, conducted in 1977. That means all adults were equally likely to be selected for the sample and should have approximated the U.S. adult population from every geographic area and at every demographic level. The study was designed to investigate nondaily papers and attempted to distinguish between paid and nonpaid papers and those delivered to the home or secured elsewhere.

The Southern California study, on the other hand, attempted to calculate the pervasiveness of free-circulated papers and to chart peoples' perceptions of this medium and its use of them. The study was conducted by myself and a colleague, Dr. Ed Trotter, in the Long Beach and northwest portions of Orange County below Los Angeles.

Its sample was a random selection of single residences (87%), multiple-family residences (6%) and apartments (7%). This approach was used because past discussions of shopper distribution suggested it was difficult to circulate them in apartment complexes.

It is not surprising to note, therefore, that the latter study's 432 households had a higher shopper penetration than did the national random survey of adults in the former study.

▪ Both investigations had difficulty distinguishing among the variety of nondaily papers, noting they might be weeklies, advertising sheets or pennysavers only; sent through the mail, available in stores only or distributed to front yards; fully paid, partially paid or circulated free of charge. Knowing the diversity of shoppers might cause respondent confusion, both studies carefully distinguished between the paid-free and the home-store dyads.

The national study found 46% of the adults received one or more free papers at home; in Southern California the figure was 76%. Much of the 30% difference may be attributed to the exclusion of apartment dwellers in the California study. Yet this discrepancy was the largest for any of the comparable findings of the two studies.

(Continued on Page S-6)

Publishers sign for cable tv share

BY ED ZOTTI

CHICAGO—As the scramble for cable tv franchises heats up across the country, many suburban newspaper publishers who've been anxiously contemplating the looming struggle for the suburban ad dollar are finding it's better to join 'em now rather than try to beat 'em later, when cable will be an established competitor.

Some two dozen publishers here have signed up for minority shares (typically 2½% to 10%) in joint ventures with Metrovision, an Atlanta-based subsidiary of the Newhouse newspapers chain seeking suburban cable franchises in the area. In another deal, Paddock Publications in Arlington Heights, Ill., has joined forces with Cox Cable Communications.

In Wisconsin, Post Corp., a newspaper publisher with broadcast tv holdings in the northern part of the state, has signed a partnership agreement with Metrovision for 20% of any franchises obtained in the Milwaukee area. Publishers in or near Boston, Detroit and other cities also report they're taking a close look at cable, either with the idea of pursuing a cable tv partnership or at least leasing a channel or two.

▪ The advantage of newspaper partnerships for the cable tv companies is obvious enough—"if you're an outsider you always try to hook up with somebody local," one cable spokesman candidly observes.

The publishers' motives in exploring the possibilities of cable tv are often less an infatuation with the charms of video than a simple fear of the unknown, coupled with the expectation that if they don't take advantage of cable's opportunities, their competitors will.

"I was talking with the president of a cable company who said he's now being approached by shoppers," one publisher says.

Unlike broadcast tv, which hasn't had much of an impact on suburban newspapers, "cable tv can be very localized. It can cover very congruently the same area that a suburban newspaper serves," says Ben Compaine, executive director of the media and allied areas at Harvard's Program on Information Resources Policy. With its no-waste coverage, "cable could sell advertising to local people and drain off advertising revenue from newspapers."

Mr. Compaine has advised suburban publishers at national conferences to do one of several things: "First, try to buy a cable system and be the operator. The problem with that is the high cost involved and, unless you're a very large operation, you may not be able to afford it. A second approach is to lease a channel, which for many is the more practical way."

Partnership with a cable company, naturally, is a third option.

Apart from its value as a purely defensive tactic, getting into cable offers publishers a potentially profitable outlet for the news/advertising product they're already putting into their newspapers. To be sure, that means reassessing traditional notions of newspapering.

"The future is in delivering information," observes Lou Lerner, publisher of Lerner Newspapers, a chain of suburban and neighborhood papers in Chicago. "It's the Gillette razor blade principle. It's not as important to own the razor [i.e., the printing presses] as it is to furnish the blade [i.e., information]. We're in a peculiarly favorable position to furnish the blade."

▪ What form the newspapers' contribution to cable might take is pretty much up in the air at this point. In the past year or so, the media have been full of reports on projects ranging from Ted Turner's 24-hour Cable News Network to more exotic schemes like Britain's Prestel, a "universal data base" operated by the British Post Office that gives subscribers access to everything from stock reports to train timetables via their tv screens.

The simplest sorts of "electronic newspapers" are the videotext systems, such as those presently operated by United Press International and Reuters news services. Here viewers basically watch a sort of video teletype in which stories scroll slowly past on the screen. A variation of this scheme flashes a sequence of video "pages" before the viewer.

The Mason City (Ia.) *Globe-Gazette*, one of the few small newspapers that actually has a videotext system up and running, typically feeds 30 to 40 pages to several thousand cable subscribers over one of the two channels it leases. At 20 seconds per page, viewers "can get the whole sequence in 11 minutes," reports publisher Jerry Moriarity.

In operation for only a month so far, the Mason City system features ads and condensed versions of news stories supplied by *Globe-Gazette* staffers. The paper plans to use its second channel to run videotape of area news events, interspersed with conventional filmed commercials, although they may run longer than the usual :30 to :60 broadcast limit. Construction of a tv studio is under way.

(Similarly, Post Corp., which already owns a sizable tv production company, expects to contribute heavily to conventional cable programing.)

Down the road a bit are two-way interactive video systems that permit the user to call up any of several hundred to (potentially) several million screenfuls of text at will. Such technology, generically called viewdata, relies on telephone lines but readily could be adapted to cable.

Ultimately, such a setup might permit a subscriber to call up an airline schedule, place a reservation and order funds transferred from his bank account to pay for the ticket—all through his home video unit.

There's little question that the more thorough suburban newspapers, with their heavy local orientation, have an information product that might compete successfully with other outlets, notably electronic news generated by their downtown cousins.

"If I were to take a metropolitan paper and measure out the portion that could be supplied by some other information provider such as the *New York Times* or the *Wall Street Journal*, I'm sure I'd find that a good bit of it was duplicated," says Bruce Sagan, publisher of the daily Southtown Economist Newspapers, another Chicago area chain. "Suburban newspapers have a set of information that nobody else can match," he adds.

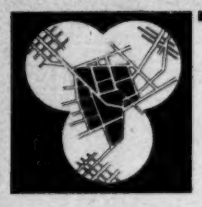
But, while two-way communication offers a real opportunity to newspapers that get in while the getting is good, it also poses a real threat to those who don't. Among other things, it could chip away at the lucrative newspaper classified advertising market.

Such "directory" ads, the kind that readers will actively seek out, also include things like movie and restaurant sections and even, to a certain extent, grocery and department store ads. Suburban Newspapers of America (SNA), a trade association representing some 900 papers, estimates that its members derive 15% of their revenues from classified ads.

Skeptics aren't hard to find—and it is hard to imagine lugging your tv around with you while you search for a job or a new apartment. But the potential is real.

(Continued on Page S-6)

Ed Zotti is a Chicago-based free lance writer and frequent contributor to ADVERTISING AGE.



Public perception

Studying the shoppers

(Continued from Page S-2)

The national study found a huge difference in penetration between families with incomes under $8,000 and those with incomes over $25,000. Only 49% of the former had access to the shoppers while 75% of the latter had access.

Again we may assume the higher income families are more likely to have their own homes while the lower income families are more likely to be in apartments. Of course it is an advantage to shoppers to concentrate delivery in the high-income areas. After all, these are the residences advertisers want to reach.

Other attributes which correlate with income also distinguish between levels of access to shoppers: The national study showed 49% of the 65-year-old and older group receive shoppers; 46% of those without a high school degree and only 33% of all nonwhites receive them.

That shoppers are more a product of the suburbs than other communities was documented in the national study as 67% of those living in their present community less than five years had access to a free paper compared with 55% of those living in the same community five years or longer.

In the national study, 72% of the local paid weekly readers and 69% of the local free paper readers also were regular daily newspaper readers (defined as those who read a daily four or more days in the past week).

The national study touches on a finding reported in the California study—that the shoppers are actually relied upon more by a generally lower demographic group, even though that group is less likely to receive them. The figures for reading thoroughness of free papers in the national study show 29% of all respondents who got the paper reported reading it thoroughly.

But 40% of middle income respondents, 37% of nonwhites and 34% of those living in their community less than five years reported thorough reading of free papers. The NAB contrasts these figures with the 74% of respondents to their 1973 national study, who picked dailies over free weeklies when asked which they read more thoroughly.

■ Our goal in California was to try to determine if the free papers were being substituted for the daily newspaper. We found that people used the shoppers as a supplement for dailies rather than as a substitute. Still, the shoppers were having an impact.

Three-quarters of the California residents said they received a free home-delivered paper and 42% said they got two or more such publications. A total of 23% who received them said they had been asked to pay for the papers at one time or other.

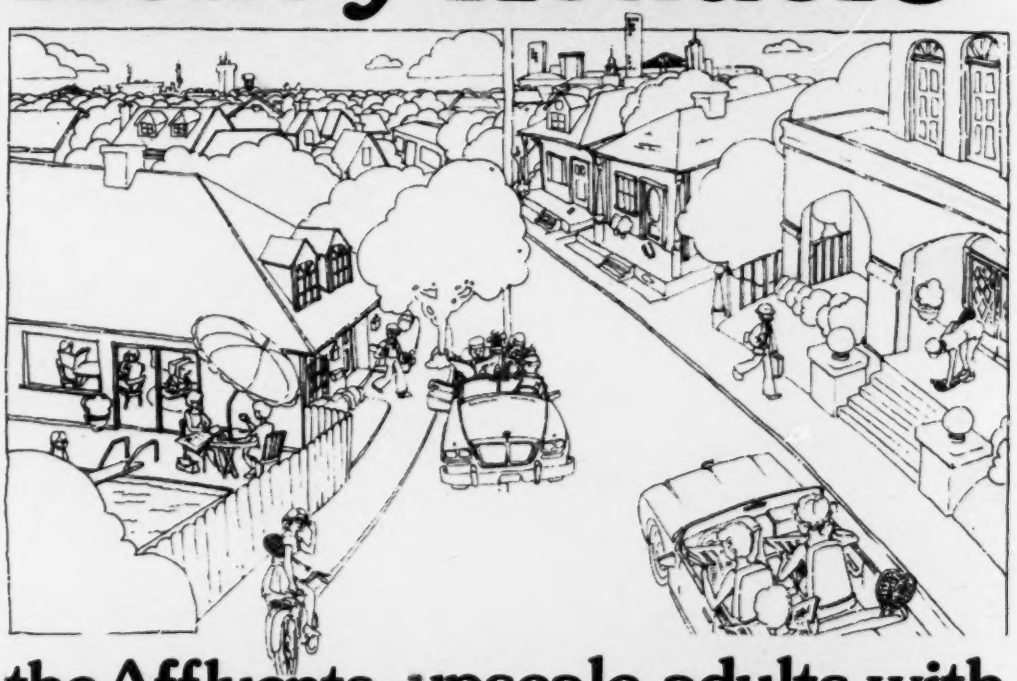
Other indications of the impact of these free papers in the California suburbs were that 62% of those receiving a free home-delivered paper could name it.

• Also, as Table 1 shows, the daily newspaper is the superior advertising medium, but the free home paper and even the store shopper gets a significant percentage of advertising readership and ad activity.

• 48% of those who receive free papers found them useful and 41% of those who get store shoppers found them useful. However, 33% of those receiving a home-delivered free paper said they thought it was a nuisance.

• As Table 2 shows, some 58% of those receiving the free home-delivered papers read editorial content; some 57% read advertising

High Rollers 'n' Heavy Readers



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Upscale Audience Demographics:

Family Income	weekday	Sunday	wdy.& Sun. net
$15,000-$24,999	74%	80%	85%
$25,000 and over	77%	83%	88%

source: Bolden Associates Continuing Market Study of metro New Orleans adults, January through December 1980

The Times-Picayune/The States-Item

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Cable tv

(Continued from Page S-2)

"To use an easy example, suppose the Yellow Pages were available on cable tv and you could punch a few buttons to let your fingers do the walking," Mr. Sagan says. "The advantages there are obvious. When you start getting into retail advertising and so on, where an element of randomness is important, the situation gets more complex. But there's simply no question that cable is going to be a competitor."

The question, of course, is how much of a competitor, which leads to consideration of the impact of "electronic news" on print. There's little doubt that in its simplest form the video newspaper can provide a useful and more or less benign supplement to its paper-and-ink cousin.

"We feel it enhances the newspaper's position in the community," Mr. Moriarity asserts, since a video story may conclude with a note advising the viewer to read the newspaper for more detail. The paper also can run promotions for itself. Once, the *Globe-Gazette* was able to notify cable viewers that there'd be a three-hour delivery delay due to a press breakdown.

But what effect a full-blown interactive video newspaper drawing on comprehensive data banks might have is anybody's guess. "The consumer has not yet spoken," one source notes. Apart from tests here and there, little market research has been done.

content. We note also that about 9% of those who don't receive such papers at their homes report reading the editorial and advertising content. This is probably an indication of the amount of secondary readership for the shoppers—some people who don't get them seem to read them at the homes of relatives or friends.

• 77% of respondents who reported reading any portion of their shoppers read both advertising and editorial matter.

But the California study could not document a greater reliance on shoppers among those who did not receive a daily newspaper. There was no perceived difference in use of either the home delivered or the store shopper based on whether the respondent subscribed to a daily newspaper.

What we did find—and this seems to relate to shopper use in the suburbs and distances more removed from the central city—was that subscriptions to a metro daily drop as the residential distance from the heart of the city increases. And as the distance from the central city increases, the perceived utility of home-delivered shoppers increases. But there is no difference in perceived usefulness of the store shopper at greater distances from the central city.

The California study tried to put respondents in three income categories based on the interviewer's impression of what family income might be depending on the size of home, number of cars and other visual impressions. Hence the division of below $10,000, $10,000 to $20,000 and above $20,000 income is certainly a fallible guess. But the findings based on income seemed to gel with those of the national study.

We found that as income increased perceived value of the store shoppers decreased: these papers were used more by low-income residents. There was a similar trend for the home-delivered free papers, but not as distinct as for the store papers.

The California study also concluded that people make a distinction between home-delivered free papers and store shoppers, with the former rated more useful.

To briefly summarize the main findings of the two studies on free-distribution newspapers, both investigations found the papers available to the majority of residents, with suburban areas more likely to receive them and to use them more heavily for both advertising and editorial content.

Both studies indicate the more wealthy residents have greater access to the throwaways, but these papers are most influential among middle and lower-income residents.

But the best documented finding of the two surveys was the evidence that free home-delivered shoppers are not being taken lightly by residents. These papers are a source of information and an advertising medium, and are accepted in today's marketplace.

The findings should not be a cause for alarm among daily papers, but the evidence suggests these shoppers are competitors that must be taken seriously.

• Do daily publishers take them seriously?

To find out, we asked publishers and managers of 13 paid-circulation papers in the Southern California area some questions.

Asked to name papers they considered competitors of their own newspaper, the publishers were allowed to list four each. In this group, 14 free-circulation papers were named.

"What other papers in the area compete with you for advertising and/or classified ads?" we asked, and this group of answers yielded five more shoppers.

When we probed further about the effects of shoppers and the free newspapers found only in retail store racks, we got the replies shown in Table 3. It seems there's a high awareness of shoppers but the concern is primarily in ad sales. A substantial number of publishers were concerned about the store rack shoppers, though several mentioned these effects were slight or limited to classified advertising. (One publisher said "every ad they get is one we lost.")

Finally, we asked the publishers, "What are your projections for the future of the shoppers in this area?" Negative predictions were given by 60% of the paid-circulation managers; 20% said shopper prospects were good.

Among the two extremes was one publisher's comment. "If I owned a shopper, I'd be optimistic." Another said, "If they show signs of becoming important, we will preempt the field," by putting out a shopper too. #

"It's too early to even be able to ask intelligent questions," Mr. Sagan says.

• Despite gloomy predictions in some quarters, nobody is seriously suggesting that suburban newspapers will vither away altogether under the cable tv onslaught.

"I just don't see it happening," says Jim Elsener, SNA executive director. "I see cable tv as filling another niche."

From an advertiser's point of view, he says, "there are problems associated with all media and cable gives you a few things that newspapers don't give you and a few things that broadcast doesn't give you. But I really don't think that, unless there's a drastic change in people's habits," that it'll have a major impact on the suburban press. "The danger is more on the network side than on newspapers."

John Rothman, director of research and information technology for the *New York Times*, concurs. "People will always want to read. You can't take your tv to the bathroom or on the train or to the barber shop. It's hard to browse (with tv) and it's hard to read long articles. Tv as a medium for textual information is best suited for terse items that can fit into a screenful of say, 100 words," he adds, observing that tv might be useful for directories, catalogs or schedules.

Besides ease of use, another factor that may hinder the spread of electronic newspapers is cost. Columbus, O.-based CompuServe, a subsidiary of H&R Block, offers subscribers an electronic version

(Continued on Page S-14)

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Top Nielsen-rated syndicated fare—markets 26 to 50 (May sweeps)

Rank	Show	Station	Time	Distributor	DMA Rating
	CINCINNATI (26)				
1.	Joker's Wild	WCPO-TV	7:30-8 M-F	Colbert	15
2.	PM Magazine	WKRC-TV	7:30-8 M-F	Group W	14
3.	M*A*S*H	WXIX-TV	7-7:30 M-F	20th Century-Fox	12
3.	Lawrence Welk	WLWT	7-8 Sa	Fedderson	12
5.	Donahue	WLWT	9-10 a.m. M-F	Multimedia	11
6.	Joker! Joker! Joker!	WCPO-TV	7:30-8 Sa	Colbert	10
6.	Tic Tac Dough	WKRC-TV	7-7:30 M-F	Colbert	10
8.	Hollywood Squares	WLWT	7-7:30 M-F	Filmways	9
9.	M*A*S*H	WXIX-TV	6:30-7 Sa	Fox	8
9.	Happy Days Again	WXIX-TV	6:30-7 M-F	Paramount	8
9.	Family Feud PM	WLWT	7:30-8 M&W	Viacom	8
9.	Starsky & Hutch	WLWT	4-5 M-F	Columbia	8
9.	Streets of San Francisco	WLWT	5-6 M-F	Victory	8
9.	Dinah & Friends	WKRC-TV	4-5:30 M-F	Fox	8
9.	In Search Of	WLWT	7:30-8 F	Bristol-Myers	8
9.	When Havoc Struck	WXIX-TV	7-7:30 Sa	Mobil	8
	MILWAUKEE (27)				
1.	M*A*S*H	WISN-TV	10:30-11 M-Sa	Fox	21
2.	Joker's Wild	WITI-TV	6:30-7 M-F	Colbert	16
3.	Tic Tac Dough	WISN-TV	6-6:30 M-F	Colbert	12
3.	Muppet Show	WTMJ-TV	6:30-7 Th	ITC	12
3.	M*A*S*H	WISN-TV	4:30-5 M-F	Fox	12
6.	PM Magazine	WISN-TV	6:30-7 M-F	Group W	10
7.	Family Feud	WTMJ-TV	6:30-7 M&W	Viacom	9
7.	Hee Haw	WISN-TV	6-7 Sa	Yongestreet	9
7.	Bob Newhart	WITI-TV	10:30-11 M-F	Viacom	9
7.	$1.98 Beauty Show	WTMJ-TV	5-5:30 Sa	Chuck Barris	9
7.	M*A*S*H	WISN-TV	11-11:30 Sa	Fox	9
	KANSAS CITY (28)				
1.	PM Magazine	KMBC-TV	6:30-7 M-F	Group W	17
2.	M*A*S*H	KMBC-TV	10:30-11 M-F	Fox	13
3.	Cross Wits	WDAF-TV	6:30-7 M-F	Metromedia	11
4.	Hee Haw	WDAF-TV	6:30-7 Sa	Yongestreet	10
5.	Face the Music	WDAF-TV	6:30-7 M-F	Sandy Frank	9
5.	Lawrence Welk	KMBC-TV	6-7 Sa	Fedderson	9
5.	M*A*S*H	KMBC-TV	4:30-5 M-F	Fox	9
5.	Family Feud PM	KCMO-TV	6:30-7 Tu & F	Viacom	9
5.	Muppet Show	KMBC-TV	5-5:30 Su	ITC	9
10.	Donahue	KCMO-TV	9-10 a.m. M-F	Multimedia	8
	BUFFALO (29)				
1.	Tic Tac Dough	WKBW-TV	7-7:30 M-F	Colbert	20
2.	Joker's Wild	WKBW-TV	7:30-8 M-F	Colbert	18
3.	M*A*S*H	WIVB	5:30-6 M-F	Fox	14
3.	Hee Haw	WGR-TV	7-8 Sa	Yongestreet	14
5.	PM Magazine	WIVB	7-7:30 M-F	Group W	12
6.	Sha Na Na	WKBW-TV	7:30-8 Sa	Lexington	10
6.	Muppet Show	WGR-TV	7:30-8 Tu	ITC	10
6.	Horowitz-Byline	WIVB	6:30-7 Su	Carbie Productions	10
6.	Donahue	WKBW-TV	9-10 a.m. M-F	Multimedia	10
10.	Match Game	WIVB	7:30-8 M-F	Victory	9
	NASHVILLE (30)				
1.	Tic Tac Dough	WTVF	6:30-7 M-F	Colbert	19
2.	Bugs Bunny	WTVF	6-7 Sa	Warner	14
3.	Hee Haw	WTVF	5:30-6:30 Sa	Yongestreet	13
3.	Happy Days Again	WSM-TV	5-5:30 M-F	Paramount	13
3.	Good Times	WTVF	5-5:30 M-F	Tandem	13
6.	Gilligan's Island	WTVF	4-4:30 M-F	United Artists	12
6.	M*A*S*H	WNGE	5:30-6 M-F	Fox	12
6.	Sanford & Son	WTVF	4:30-5 M-F	Tandem	12
6.	Donahue	WSM-TV	9-10 a.m. M-F	Multimedia	10
10.	PM Magazine	WNGE	6:30-7 M-F	Group W	9
10.	Carol Burnett & Friends	WTVF	10:30-11 M-F	Silverbach/Lazarus	9
10.	Gunsmoke	WTVF	10:30-11 Sa&S	Viacom	9
10.	Wanted: Dead or Alive	WTVF	5-5:30 Sa	Four Star	9
	PHOENIX (31)				
1.	M*A*S*H	KPHO-TV	6:30-7 M-F	Fox	19
2.	Happy Days Again	KPHO-TV	6-6:30 M-F	Paramount	13
3.	Muppet Show	KPNX-TV	6-6:30 Sa	ITC	12
3.	Tic Tac Dough	KPNX-TV	6:30-7 M-F	Colbert	12
5.	Hee Haw	KPHO-TV	6-7 Sa	Yongestreet	11
5.	Sha Na Na	KPHO-TV	5:30-6 Sa	Lexington	11
7.	Bionic Woman	KPHO-TV	4-5 Sa	MCA	10
7.	Family Feud PM	KPNX-TV	6:30-7 Sa	Viacom	10
9.	Jim Rockford	KPHO-TV	7-8 M-F	MCA	9
9.	In Search Of	KTVK-TV	6:30-7 Sa	Bristol-Myers	9
	PROVIDENCE/NEW BEDFORD (32)				
1.	Tic Tac Dough	WJAR-TV	7:30-8 M-F	Colbert	17
1.	PM Magazine	WJAR-TV	7-7:30 M-F	Group W	17
3.	M*A*S*H	WPRI-TV	5:30-6 M-F	Fox	16
4.	Lawrence Welk	WPRI-TV	7-8 Sa	Fedderson	14
5.	Newlywed Game	WPRI-TV	7-7:30 M-F	Worldvision	13
6.	Dance Fever	WJAR-TV	7:30-8 Sa	Fox	12
6.	Cross Wits	WPRI-TV	7:30-8 M-F	Metromedia	12
8.	Merv Griffin	WPRI-TV	4-5:30 M-F	Metromedia	11
8.	Sha Na Na	WJAR-TV	7-7:30 Sa	Lexington	11
10.	Donahue	WJAR-TV	9-10 a.m. M-F	Multimedia	10
	CHARLOTTE (33)				
1.	PM Magazine	WBTV	7:30-8 M-F	Group W	21
2.	Lawrence Welk	WBTV	7-8 Sa	Fedderson	15
3.	Newlywed Game	WSOC-TV	7:30-8 M-F	Worldvision	12
4.	Grizzly Adams	WBTV	5-6 M-F	Viacom	11
4.	Cross Wits	WSOC-TV	7-7:30 M-F	Metromedia	11
4.	Muppet Show	WBTV	8-8:30 M	ITC	11
4.	M*A*S*H	WSOC-TV	5:30-6 M-F	Fox	11
8.	Happy Days Again	WBTV	4:30-5 M-F	Paramount	10
8.	Hee Haw	WSOC-TV	7-8 Sa	Yongestreet	10
9.	Good Times	WCCB	7-7:30 M-F	Tandem	9
9.	What's Happening	WBTV	4-4:30 M-F	Columbia	9
	COLUMBUS, O. (34)				
1.	Family Feud PM	WBNS-TV	7:30-8 M&F	Viacom	15
1.	PM Magazine	WCMH	7:30-8 M-F	Group W	15
3.	Hee Haw	WTVN-TV	7-8 Sa	Yongestreet	14
4.	Bugs Bunny	WBNS-TV	7-8 Sa	Warner	13
4.	Lawrence Welk	WCMH	7-8 Sa	Fedderson	13
6.	M*A*S*H	WBNS-TV	5:30-6 M-F	Fox	12
6.	Tic Tac Dough	WCMH	7-7:30 M-F	Colbert	12
6.	Match Game PM	WTVN-TV	7:30-8 W	Victory	12
9.	Muppet Show	WTVN-TV	7:30-8 M	ITC	10
9.	Donahue	WCMH	9-10 a.m. M-F	Multimedia	10
	MEMPHIS (35)				
1.	Tic Tac Dough	WMC-TV	6:30-7 M-F	Colbert	23
2.	Hee Haw	WREG-TV	6:30-7 Sa	Yongestreet	22
3.	Good Times	WHBQ-TV	5:30-6 M-F	Tandem	16
4.	Match Game	WREG-TV	6:30-7 M-F	Victory	12
5.	Mary T. Moore	WREG-TV	5-5:30 M-F	Viacom	11
5.	I Love Lucy	WREG-TV	4-4:30 M-F	Viacom	11
5.	Muppet Show	WREG-TV	5-5:30 Su	ITC	11
5.	Wild Kingdom	WREG-TV	5:30-6 Su	Bozell & Jacobs	11
9.	Pop Goes Country	WMC-TV	4:30-5 Sa	Show Biz	10
9.	Nashville on Road	WMC-TV	4-4:30 Sa	Show Biz	10
9.	Donahue	WMC-TV	9-10 a.m. M-F	Multimedia	10
	NEW ORLEANS (36)				
1.	Family Feud PM	WWL-TV	6:30-7 Sa	Viacom	20
1.	PM Magazine	WWL-TV	6:30-7 M-F	Group W	20
3.	Sanford & Son	WVUE	10:30-11 M-F	Tandem	16
3.	M*A*S*H	WWL-TV	10:30-11 M-F	Fox	16
5.	What's Happening	WVUE	4:30-5 M-F	Columbia	13
5.	Tic Tac Dough	WDSU-TV	6:30-7 M-F	Colbert	13
5.	Tom & Jerry	WVUE-TV	3:30-4:30 M-F	MGM	13
8.	Dick Van Dyke	WWL-TV	5-5:30 Sa	Viacom	11
8.	Muppet Show	WDSU-TV	6:30-7 M	ITC	11
8.	Good Times	WGNO-TV	6:30-7 M-F	Tandem	11
8.	Starsky & Hutch	WVUE	11-12 M-F	Columbia	11
	GREENVILLE/SPARTANBURG/ASHVILLE (37)				
1.	Tic Tac Dough	WLOS-TV	7:30-8 M-F	Colbert	18
2.	Hee Haw	WSPA-TV	7:30-8 Sa	Yongestreet	16
2.	Joker's Wild	WLOS-TV	7-7:30 M&F	Colbert	16
4.	Dance Fever	WFBC-TV	7-7:30 Sa	Fox	13
4.	Sha Na Na	WFBC-TV	7:30-8 Sa	Lexington	13
6.	Name That Tune	WFBC-TV	6:30-7 Sa	Sandy Frank	12
6.	Family Feud PM	WSPA-TV	7:30-8 M&F	Viacom	12
8.	Match Game	WFBC-TV	7:30-8 M-F	Victory	11
8.	Dating Game	WSPA-TV	7-7:30 M-F	Firestone	11
10.	Guinness Game	WSPA-TV	7:30-8 W	Fox	10
10.	M*A*S*H	WLOS-TV	5:30-6 M-F	Fox	10
10.	Donahue	WFBC-TV	9-10 a.m. M-F	Multimedia	10
10.	Good Times	WFBC-TV	5:30-6 M-F	Tandem	10
10.	In Search Of	WSPA-TV	7:30-8 Tu	Bristol-Myers	10
	GRAND RAPIDS/KALAMAZOO (38)				
1.	Lawrence Welk	WKZO-TV	7-8 Sa	Fedderson	15
2.	Muppet Show	WOTV	7-7:30 Sa	ITC	14
3.	Tom & Jerry	WOTV	7:30-8 Sa	MGM	12
3.	Newlywed Game	WOTV	7:30-8 M-F	Worldvision	12
3.	Donahue	WOTV	9-10 a.m. M-F	Multimedia	12
6.	American Lifestyle	WOTV	7-7:30 M	Showcase Corp.	11
7.	Happy Days Again	WOTV	5:30-6 M-F	Paramount	10
7.	Match Game	WKZO-TV	7-7:30 M-F	Victory	10
9.	Tom & Jerry	WOTV	4:30-5 M-F	MGM	9
9.	Joker's Wild	WZZM-TV	7:30-8 M-F	Colbert	9
9.	Merv Griffin	WKZO-TV	4:30-6 M-F	Metromedia	9
9.	Tic Tac Dough	WKZO-TV	7:30-8 M-F	Colbert	9
	BIRMINGHAM (39)				
1.	Tic Tac Dough	WBRC-TV	6-6:30 M-F	Colbert	31
2.	Joker's Wild	WBRC-TV	6:30-7 M-F	Colbert	30

(Continued on Page 64)

Top Nielsen-rated syndicated fare—markets 26 to 50 (May sweeps)

Rank	Show	Station	Time	Distributor	DMA Rating
	(Continued from Page 62)				
3.	Hee Haw	WVTM-TV	6-7 Sa	Yongestreet	18
4.	Lawrence Welk	WBRC-TV	6-7 Sa	Fedderson	15
5.	Gunsmoke	WBRC-TV	4-5M-F	Viacom	13
6.	M*A*S*H	WVTM-TV	4:30-5 M-F	Fox	12
6.	Happy Days Again	WVTM-TV	4-4:30 M-F	Paramount	12
6.	Bewitched	WBRC-TV	3:30-4 M-F	Columbia	12
9.	Tom & Jerry	WVTM-TV	3:30-4 M-F	MGM	11
10.	M*A*S*H	WVTM-TV	10:30-11 M-F	Fox	10
	OKLAHOMA CITY (40)				
1.	M*A*S*H	KOCO-TV	10:30-11 M-Su	Fox	19
2.	Tic Tac Dough	KOCO-TV	6:30-7 M-F	Colbert	18
3.	Joker's Wild	KOCO-TV	6-6:30 M-F	Colbert	17
4.	Match Game	KTVY	6:30-7 T&T	Victory	11
4.	Hee Haw	KOCO-TV	6-7 Sa	Yongestreet	11
6.	Family Feud PM	KTVY	6:30-7 M&W	Viacom	9
6.	Donahue	KOCO-TV	9-10 a.m. M-F	Multimedia	9
8.	Kung Fu	KTVY	5-6 Sa	Warner	8
8.	Hogan's Heroes	KTVY	5-5:30 M-F	Viacom	8
10.	Price Is Right	KTVY	6:30-7 F	Viacom	7
10.	Sanford & Son	KOCO-TV	6:30-7 M-F	Tandem	7
	ORLANDO-DAYTONA (41)				
1.	Lawrence Welk	WFTV	7-8 Sa	Fedderson	21
2.	Joker's Wild	WFTV	7-7:30 M-F	Colbert	19
3.	PM Magazine	WDBO-TV	7-7:30 M-F	Group W	14
4.	M*A*S*H	WDBO-TV	5:30-6 M-F	Fox	13
4.	Family Feud	WFTV	7:30-8 M&F	Viacom	13
6.	Hee Haw	WDBO-TV	7-8 Sa	Yongestreet	12
7.	Tic Tac Dough	WESH-TV	7:30-8 M-F	Colbert	11
8.	Hollywood Squares	WFTV	7:30-8 W	Filmways	10
8.	Newlywed Game	WDBO-TV	7:30-8 M-F	Worldvision	10
8.	$100,000 Name That Tune	WFTV	7:30-8 Th	Sandy Frank	10
8.	Merv Griffin	WFTV	4:30-6 M-F	Metromedia	10
	LOUISVILLE (42)				
1.	Hee Haw	WHAS-TV	7-8 Sa	Yongestreet	20
2.	Muppet Show	WHAS-TV	7:30-8 F	ITC	17
3.	Face the Music	WHAS-TV	7:30-8 MTuWTh	Sandy Frank	16
4.	M*A*S*H	WHAS-TV	5:30-6 M-F	Fox	14
5.	Nashville Music	WAVE-TV	7:30-8 F	Gardner Adv.	11
5.	Andy Griffith	WHAS-TV	5-5:30 M-F	Viacom	11
5.	$1.98 Beauty Show	WAVE-TV	7:30-8 M	Chuck Barris	11
8.	America's Top 10	WAVE-TV	7:30-8 W	Gold Key Media	10
9.	Joker's Wild	WLKY-TV	7-7:30 M-F	Colbert	9
9.	Play Percentage	WAVE-TV	7-7:30 M-F	Colbert	9
	NORFOLK-PORTSMOUTH-NEWPORT NEWS (43)				
1.	Hee Haw	WTAR-TV	7-8 Sa	Yongestreet	19
2.	PM Magazine	WTAR-TV	7:30-8 M-F	Group W	18
3.	Cross Wits	WTAR-TV	7-7:30 M-F	Metromedia	17
4.	Family Feud PM	WAVY-TV	7:30-8 Tu&Th	Viacom	13
5.	Muppet Show	WAVY-TV	7:30-8 F	ITC	12
5.	All in the Family	WVEC-TV	5-5:30 M-F	Viacom	12
7.	Name That Tune	WAVY-TV	7:30-8 M	Sandy Frank	11
7.	Happy Days Again	WVEC-TV	4:30-5 M-F	Paramount	11
7.	Donahue	WTAR-TV	9-10 a.m. M-F	Multimedia	11
10.	Merv Griffin	WTAR-TV	4:30-5 M-F	Metromedia	10
	SAN ANTONIO (44)				
1.	PM Magazine	KSAT-TV	6:30-7 M-F	Group W	20
2.	Hee Haw	KENS-TV	6-7 Sa	Yongestreet	19
3.	M*A*S*H	KSAT-TV	10:30-11 M-F	Fox	16
4.	Muppet Show	KMOL-TV	6-6:30 Sa	ITC	14
4.	Newlywed Game	KSAT-TV	6-6:30 M-F	Worldvision	14
4.	Tic Tac Dough	KMOL-TV	6:30-7 M-F	Colbert	14
7.	Happy Days Again	KMOL-TV	5-5:30 M-F	Paramount	13
7.	Wild Kingdom	KMOL-TV	6:30-7 Sa	Bozell & Jacobs	13
9.	M*A*S*H	KSAT-TV	4:30-5 M-F	Fox	12
10.	Joker's Wild	KENS-TV	6:30-7 M-F	Colbert	10
	WILKES-BARRE (45)				
1.	Tic Tac Dough	WNEP-TV	7:30-8 M-F	Colbert	19
1.	PM Magazine	WNEP-TV	7-7:30 M-F	Group W	19
3.	Hee Haw	WBRE-TV	7-8 Sa	Yongestreet	15
3.	Muppet Show	WNEP-TV	6:30-7 Su	ITC	15
5.	Joker's Wild	WBRE-TV	7-7:30 M-F	Colbert	14
6.	M*A*S*H	WBRE-TV	5:30-6 M-F	Fox	13
7.	Joker! Joker! Joker!	WBRE-TV	7:30-8 W&Th	Colbert	11
8.	Donahue	WBRE-TV	9-10 a.m. M-F	Multimedia	10
8.	M*A*S*H	WBRE-TV	5-5:30 M-F	Fox	10
10.	Dance Fever	WBRE-TV	7:30-8 M	Fox	9
10.	Odd Couple	WBRE-TV	5-5:30 M-F	Paramount	9
	RALEIGH-DURHAM (46)				
1.	Hee Haw	WTVD	7-8 Sa	Yongestreet	19
2.	Sanford & Son	WRAL-TV	7-7:30 M-F	Tandem	18
2.	Happy Days Again	WRAL-TV	7:30-8 M-F	Paramount	18
4.	Joker's Wild	WTVD	7-7:30 M-F	Colbert	16
5.	Tic Tac Dough	WTVD	7:30-8 M-F	Colbert	15
6.	Good Times	WRAL-TV	5-5:30 M-F	Tandem	12
6.	Andy Griffith	WRAL-TV	5:30-6 M-F	Viacom	12
8.	M*A*S*H	WTVD	5:30-6 M-F	Fox	9
8.	Tom, Jerry & Friends	WRAL-TV	4-4:30 M-F	MGM	9
10.	I Love Lucy	WRAL-TV	4:30-5 M-F	Viacom	8
10.	Merv Griffin	WTVD	4-5:30 M-F	Metromedia	8
	HARRISBURG-LANCASTER (47)				
1.	Tic Tac Dough	WGAL-TV	7-7:30 M-F	Colbert	15
2.	Name That Tune	WGAL-TV	7:30-8 M-F	Sandy Frank	10
2.	Lawrence Welk	WHTM-TV	7-8 Sa	Fedderson	10
4.	Muppet Show	WGAL-TV	7:30-8 F	ITC	9
4.	Dance Fever	WGAL-TV	7:30-8 M	Fox	9
4.	Hollywood Squares	WGAL-TV	7:30-8 Tu&Th	Filmways	9
7.	Merv Griffin	WGAL-TV	4-5:30 M-F	Metromedia	8
7.	Carol Burnett & Friends	WGAL-TV	5:30-6 M-F	Silverbach-Lazarus	8
7.	Newlywed Game	WHTM-TV	7:30-8 M-F	Worldvision	8
7.	Joker's Wild	WHP-TV	7:30-8 M-F	Colbert	8
	SALT LAKE CITY (48)				
1.	Tic Tac Dough	KSL-TV	6:30-7 M-F	Colbert	21
1.	M*A*S*H	KSL-TV	5-5:30 M-F	Fox	21
3.	M*A*S*H	KSL-TV	10:30-11 M-F	Fox	15
4.	PM Magazine	KUTV	6:30-7 M-F	Group W	13
5.	Joker! Joker! Joker!	KUTV	6:30-7 Sa	Colbert	12
5.	Hee Haw	KSL-TV	5-6 Sa	Yongestreet	12
7.	Muppet Show	KUTV	5-5:30 Su	ITC	11
8.	Happy Days Again	KUTV	5:30-6 M-F	Paramount	10
8.	Name That Tune	KUTV	6-6:30 Sa	Sandy Frank	10
8.	Best of Donny & Marie	KTVX	5-6 Su	Osmond Tv Sales	10
	ALBANY-SCHENECTADY-TROY (49)				
1.	M*A*S*H	WTEN	5:30-6 M-F	Fox	17
2.	PM Magazine	WTEN	7-7:30 M-F	Group W	16
3.	Wild Kingdom	WRGB	6:30-7 Su	Bozell & Jacobs	15
3.	Family Feud	WRGB	7:30-8 M&Tu	Viacom	15
3.	Hollywood Squares	WRGB	6:30-7 Sa	Filmways	15
6.	Sha Na Na	WRGB	7:30-8 Th	Lexington	14
7.	Happy Days Again	WRGB	5-5:30 M-F	Paramount	12
7.	Guinness Game	WRGB	7:30-8 F	Fox	12
7.	Face the Music	WAST	7:30-8 M-F	Sandy Frank	12
10.	Hee Haw	WTEN	7-8 Sa	Yongestreet	11
10.	In Search Of	WRGB	7:30-8 Sa	Bristol-Myers	11
10.	Merv Griffin	WTEN	4-5:30 M-F	Metromedia	11
	DAYTON (50)				
1.	Cross Wits	WHIO-TV	7:30-8 M-F	Metromedia	17
2.	Hee Haw	WHIO-TV	6:30-7:30 Sa	Yongestreet	13
2.	Muppet Show	WDTN	7:30-8 Sa	ITC	13
4.	Match Game PM	WHIO-TV	7:30-8 Sa	Victory	12
5.	Happy Days Again	WHIO-TV	5:30-6 M-F	Paramount	11
6.	Donahue	WDTN	9-10 M-F	Multimedia	9
7.	Bewitched	WHIO-TV	4:30-5 Tu	Columbia	8
7.	Mary T. Moore	WHIO-TV	5-5:30 M-F	Viacom	8
7.	Face the Music	WDTN	7:30-8 M-F	Sandy Frank	8
7.	Donahue	WDTN	6-7 Su	Multimedia	8
7.	Joker's Wild	WKEF	7-7:30 M-F	Colbert	8

Explanatory note

These syndicated show top tens for the top 26 through 50 markets are based on average designated market area household ratings as reported in the NSI sweeps books covering May 1 to 28. Ties are listed in order of total households reached.

The lists were compiled for ADVERTISING AGE by a broadcast research expert. If a show ran twice a day, it was considered twice for these rankings. Syndicated movies were not included. All times are local and p.m. unless marked a.m.

"PM Magazine" co-hosts Danielle Folquet and Mike Cerre break out the bubbly for their recent debut in the New York market. The show is currently running on more than 90 stations.

Domestic wines gain at expense of imports

By JOHN C. MAXWELL JR. and DONNA M. MATTEI

Wine industry sales in 1979 grew some 10.2% over 1978, raising per capita U.S. consumption to 2.17 gals. The domestic segment was up 13.8%, while imports fell 2%.

In the various categories of taxable removals, still wines continued as the largest force in the industry, with sales up 13.3% over 1978. Effervescent wines also maintained their growth, rising 7%. Vermouth and natural wines dropped in 1979, with respective losses of 11.3% and 8.5%.

Total industry taxable removals posted a gain of 10.3%, mostly accounted for by still wines, which captured some 85% of the 1979 total.

Domestic sweet wines continued to decline, dropping 26.7%. The domestic dry and sparkling segments registered respective volume gains of 6.2% and 5.1% from 1978 levels.

▪ E. & J. Gallo remained the premier U.S. wine producer with a gain of 5.3% in sales, but dropped more than a point in market share. The Wine Spectrum, which includes Taylor, Great Western, Sterling and Monterey, moved into fourth place with a gain of 20.2% over 1978. Strong increases were also posted by Gibson and Sonoma, with gains of 26.9% and 20.9%, respectively.

Imports in 1979 declined 2% from 1978. While Italian wines account for more than half of the import market (with a 52.8 percentage), they showed only a modest gain of 6.5%. This represented a severe shrinkage from Italian gains of previous years. The increased promotion received by Italian wines as well as their moderate prices, associated with good quality, are reasons for their continuing popularity in the U.S.

▪ French wines dropped 7.5% in 1979, but remained in second place with a market share of 16.5%. Due to high prices, we expect to see French wines continue to lose share. German wines showed the largest 1979 decline, dropping 14.9%. This was due partially to cold and rainy weather during the vines' flowering period, which results in underdevelopment. Smaller supplies of grapes may push prices up, causing U.S. consumers to turn further from German wines to lower-price imports and domestic vintages.

Spanish and Portuguese wines posted respective 1979 volume losses of 11.6% and 6.1%.

We look for continued growth in the U.S. wine industry for several reasons. As noted, domestic wine consumption reached 2.17 gals. per capita in 1979. Americans are just beginning to enjoy wine, and there is a tremendous potential for increased consumption. Higher levels of education, more women holding good jobs and increased travel abroad by Americans can positively influence the amount of wine consumed in the U.S.

Wines are also more defensive in times of economic stress in that they are often consumed with meals. Also, in more and more states, wine is becoming available in supermarkets. This could have a tremendous impact on sales because special trips to state stores or liquor stores would no longer be necessary.

Although we expect to see more purchasers of wine in the years ahead, we also expect those who already purchase wine to continue doing so at a higher rate. #

The writers are with Lehman Brothers Kuhn Loeb, New York.

BERNARD D. KAHN

NEW YORK—Bernard D. Kahn, 58, head of the new product development consulting organization bearing his name, died of a heart attack here July 22.

A specialist in the development of product planning and new market identification, Mr. Kahn established his company in 1968 with Don Buckley, former creative director at Foote, Cone & Belding. The company was known for two years as Kahn/Buckley Associates and, in 1970, with Mr. Buckley's departure, became Bernard D. Kahn Associates.

Mr. Kahn joined Grey Advertising in 1958 as a copy group head from Ted Bates & Co. He was elected a vp in November, 1959, later became a Grey creative director and, in March, 1965, was named exec vp-creative services. He began his agency career in Philadelphia and moved to New York to serve at the old Milton Biow Co. and Lennen & Newell.

J. LUCIAN SMITH

ATLANTA—J. Lucian Smith, 61, retired president of Coca-Cola Co., died of a heart attack July 19 at Lake Lanier near his home here.

Mr. Smith joined Coca-Cola in 1940 in the company's bottling operation. He worked at a number of company-owned plants across the country and was named general manager-bottler sales in 1961. In 1965, he was appointed assistant marketing director for carbonated beverages. Two years later, he moved to Houston to organize the newly-acquired Duncan Foods business into the Coca-Cola Foods division.

Mr. Smith was named the first president of the foods division, which by then included Minute Maid. In 1971, he was named president of Coca-Cola USA, the domestic soft drink division, and president of Coca-Cola Co. in 1974. He retired from that post last August but remained as a director.

His early retirement last August was announced by chairman J. Paul Austin, and company officials noted then that Mr. Smith had a history of heart trouble. Mr. Smith did not comment on his abrupt departure, but there were reports that he left under pressure from Mr. Austin, who wanted to appoint a group of vice-chairmen from which the chairman's own successor would be selected. #

Domestic wine market
(Estimated sales, market shares)
(millions of gallons)

Rank 1978	Rank 1979		1978 Amount	1978 % Total	1979 Amount	1979 % Total	1978/79 Change
1	1	E. & J. Gallo	106.0	24.5%	111.6	23.4%	5.3%
2	2	United Vintners	54.7	12.7	54.4	11.4	(0.5)
3	3	Almaden	25.7	5.9	28.6	6.0	11.3
5	4	Wine Spectrum	13.2	3.1	15.9	3.4	20.2
4	5	Paul Masson	13.2	3.1	13.2	2.8	—
6	6	Guild	11.4	2.6	13.0	2.7	14.0
7	7	Franzia Bros.	10.3	2.4	11.7	2.5	13.6
9	8	Sebastiani	8.7	2.0	9.0	1.9	3.4
8	9	Mogen David	9.4	2.2	6.3	1.3	(33.4)
10	10	Christian Bros.	6.2	1.4	5.5	1.2	(10.0)
11	11	C. K. Mondavi	4.9	1.1	4.9	1.0	—
12	12	Beringer	3.4	0.8	3.5	0.7	2.9
15	13	Gibson	2.6	0.6	3.3	0.7	26.9
14	14	Bronco	2.9	0.7	2.9	0.6	—
13	15	California Growers	3.0	0.7	2.1	0.4	(30.0)
16	16	Perelli-Minetti	2.5	0.6	2.1	0.4	(16.0)
17	17	Lamont	2.5	0.6	2.0	0.4	(20.0)
18	18	East-Side	1.8	0.4	1.5	0.3	(16.7)
21	19	Wente	1.3	0.3	1.5	0.3	15.4
19	20	Robert Mondavi	1.7	0.4	1.4	0.3	(17.6)
20	21	Giumarra	1.4	0.3	1.4	0.3	—
22	22	Weibel	1.3	0.3	1.4	0.3	7.7
23	23	Sonoma	1.0	0.2	1.2	0.3	20.9
27	24	Delicato	0.6	0.1	1.0	0.2	66.7
24	25	Brookside	0.9	0.2	0.8	0.2	(11.1)
25	26	Louis Martini	0.7	0.2	0.8	0.2	14.3
26	27	Mirassou	0.7	0.2	0.7	0.1	—
28	28	F. Korbel	0.6	0.1	0.7	0.1	16.7
29	29	San Martin	0.5	0.1	0.7	0.1	40.0
30	30	M&H	0.1	—	0.2	—	100.0
31	31	Concannon	0.1	—	0.1	—	—
32	32	Vie-del	—	—	—	—	—
33	33	Filice	—	—	—	—	—
		Canandaigua	NA	NA	12.0	2.5	—
		Monarch	11.7	2.7	12.2	2.6	4.3
		Souverain Cellers	NA	NA	NA	NA	—
		Subtotal	305.0	70.5	327.6	68.6	7.4
		Other Domestic	34.3	7.9	58.4	12.2	70.3
		Total Domestic	339.3	78.4	386.0	80.8	13.8
		Imports	93.6	21.6	91.7	19.2	(2.0)
		Total	432.9	100.0%	477.7	100.0%	10.3%

NA-Not Available
Lehman Brothers research estimates

the advertising market place

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Advertising Age

50 YEARS 1930-1980

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Car makers tell revival plans

By RALPH GRAY

DETROIT—Car makers will spend money on 1981 launch marketing as if they had it. Not even whopping losses will muffle the ad drums.

General Motors' F. James McDonald spoke for all when he said of GM, "I don't think we get nervous on ad budgets in economic downturns. That's probably when you need the most advertising. If you set up a good solid program, you've got to hold in there with them. We don't gyrate up and down because of economic downturns."

Downturn is a mild word for what's been happening. GM for the second quarter lost $412,000,000, Ford Motor Co. dropped $468,000,000, Chrysler Corp. lost $536,000,000 and American Motors Corp. dropped $85,000,000.

It's enough to blunt Detroit's eternal optimism. Mr. McDonald, exec vp for GM's North American automotive operations and probably the company's next president, forecast a "long, slow, gradual climb" out of the sales slump.

"We say May bottomed at 7,200,000 cars on an annualized basis. June saw a turn up to 7,800,000. I don't believe any of us think there will be a boom and sharp upturn," he said after a speech to the Management Briefing Seminar of the University of Michigan in Traverse City, Mich.

"Next year we [the auto industry] don't have to peddle floor mats and hood ornaments for the trunk. We have some real juice," Bennett Bidwell, vp car and truck group of Ford North American operations, earlier told the *Automotive News* World Congress in Dearborn, Mich.

"We have Chrysler's K-bodies [new compacts], GM's new J- cars [subcompacts due next spring] to go with their great X-bodies [1980 compacts] and Ford's new world cars, Escort and Lynx. Maybe we will never roll the imports back to the ocean, but we will roll somebody back somewhere for a change.

"We will light a candle and hopefully a fire and possibly a conflagration in the marketplace. Methinks we will recover by and by," Mr. Bidwell said.

Car sales so far this year are down 38%, and the import share has skyrocketed with concerns over fuel economy.

Fuel economy is central to everyone's marketing strategy, it appeared at both the World Congress and U. of M. seminar.

Chrysler's new corporate ad campaign this fall—with chairman Lee Iacocca still as spokesman—is "The American way to beat the pump." Jack Givens, director of

(Continued on Page 75)

Reagan's ad agency adds old teammate

By LEAH ROZEN and RICHARD L. GORDON

NEW YORK—The top command shift at Ronald Reagan's Campaign '80 ad agency here has allowed senior Reagan adviser Peter Dailey to replace a newcomer to his circle with an old ally from the 1972 Nixon campaign.

Former Norman, Craig & Kummel president Jack Savage resigned unexpectedly last week as exec vp-general manager of Campaign '80. The exec had been plucked from a job as advertising and marketing consultant to the Federal Trade Commission only a month ago to work on the campaign.

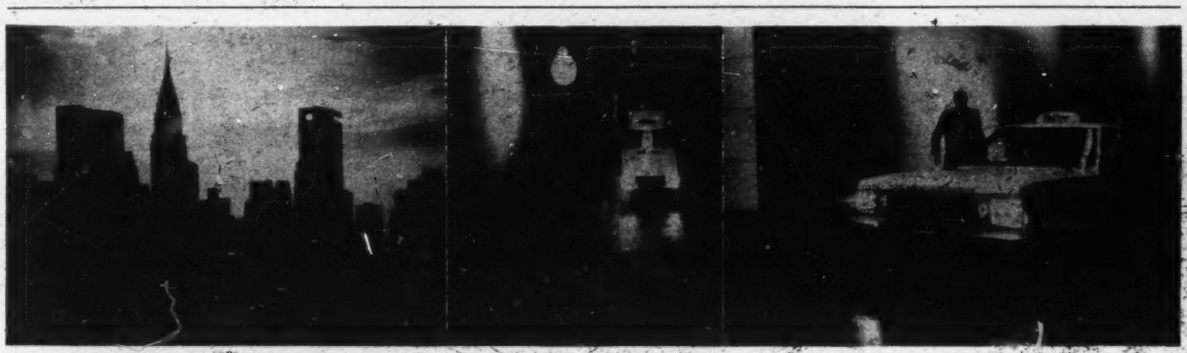
▪ His immediate replacement was another seasoned agency exec turned consultant, Richard T. O'Reilly, part of Mr. Dailey's November Group team that put together President Richard Nixon's 1972 campaign. Mr. O'Reilly will be president-general manager of the Reagan campaign.

Mr. Savage told ADVERTISING AGE that his job as general manager "was not what I expected it would be." But his departure was "amicable," he insisted, and there had been "no political differences, no differences in advertising thinking or strategy to date.

"We just had a difficult time trying to get it together among us all," he said when reached in Washington last week.

▪ In an earlier interview Mr. Savage had expressed surprise that he had been tapped for the Reagan campaign job (AA, June 30). While his ad business credentials are

(Continued on Page 75)



Bache says it beats the sun for its clients

Even before the sun comes up, Bache Halsey Stuart Shields, New York, is working to benefit its clients, says this new spot, which breaks today on the NBC-TV "Today Show" Money Matters segment. Actor Raymond Burr, in his first tv voiceover commercial role, describes Bache's "winning attitude." McCann-Erickson, New York, is the agency for the stock brokerage house.

McCann sued by car rental client

By RICHARD KREISMAN

CHICAGO—Lawyers for a group of Florida licensees of Budget Rent A Car have begun taking depositions in a suit charging that McCann-Erickson here failed to provide them with advertising services, resulting in a loss of profits.

The suit, filed in federal district court in Orlando by Budget Rent A Car Co. of Florida, master licensee for the state, accuses the agency of breach of contract and negligence in its handling of regional co-op ad dollars from September, 1978, to January, 1979. Although damages are not specified, a source close to the case called them "substantial."

McCann-Erickson and licensees had no comment on the case. Lawyers for both sides were not available. McCann also is agency for the national Budget account. Execs there also declined to comment, calling it a matter between McCann and the franchise group.

The suit charges that McCann-Erickson "failed to analyze and study ... marketing and promotional requirements and prepare advertising recommendations ... failed to plan, create, write and supervise the production of all advertising ... failed to order and contract for necessary space, time, talent and materials."

According to the complaint, the licensee and Budget Rent A Car Corp., Chicago, agreed to contribute a total of $65,000 to a regional ad fund administered by McCann-Erickson. The agreement specified that the licensee would not receive the money if it dropped McCann-Erickson as its agency.

The suit charges that as a result of McCann's actions, the licensees "lost income and profits that they would otherwise have derived directly" from the ad campaigns "had the appropriate advertising programs ... been placed ..."

"This is a highly unusual case," said Stephen Durchslag, a partner at Sidley & Austin, Chicago, and a specialist in marketing law. "I've never heard of a dispute over not providing services." Mr. Durchslag added the question of profits loss is purely speculative and difficult to prove.

However, another lawyer said breach of contract lawsuits on the part of a franchisor are not uncommon. Thomas A. Mass, a partner at Mass, Miller & Josephson, Chicago, who has represented both franchisors and agencies, also noted that loss of profit claims are hard to prove.

Since it fired McCann in early 1979, Budget Rent A Car of Florida, which controls franchises in Orlando, Tampa and Fort Lauderdale, has formed an in-house agency. The Florida franchisee spends more than $1,000,000 annually on advertising in local and national media, said one source.

The case moved to Chicago and St. Louis last week as lawyers took depositions from Morris Belzberg, president and chief executive officer of Budget Rent A Car, Meg Jacobson, vp-advertising and consumer marketing and Steve Maxwell, a former account exec at McCann, who now works at D'Arcy-MacManus & Masius, St. Louis. #

last minute news

Gleason named president of Treacher's

PHILADELPHIA—Jack Gleason has been named president of Arthur Treacher's Fish & Chips, a subsidiary of Mrs. Paul's Kitchens, succeeding Kenneth L. Horstmyer. Mr. Horstmyer, a former exec vp at Burger King, joined Treacher's in March. Mr. Gleason, founder and owner of a suburban Philadelphia restaurant called Fagleysville Inn, recently has been acting as a restaurant consultant to Mrs. Paul's. C&W, Chicago, is the Treacher's agency.

Lever Bros. tests Dimensions shampoo

NEW YORK—Lever Bros. is testing Dimensions shampoo in Albany via J. Walter Thompson Co. The product promises to get rid of the "scraglies" and make hair "shiny and healthy from end to end."

Tyree and Gardner opening agency

NEW YORK—Earl Tyree, former president of American Home Products' house agency and previously president of Glenbrook Labs, has opened an ad agency here with Ed Gardner, a former agency exec who, most recently, was vp-marketing of Bio-Products. Dr. H. James Barnum of Barnum Communications is an investor, and the new shop will have a

(Continued on Page 8)

NEWSPAPER

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DC2001ACONGLIHAGNR 02115V2001J3
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highlights

Monday, Aug. 4, 1980

From San Antonio to Waco-Temple, Arbitron markets 51 to 100, ABC, CBS and NBC have a major hold over tv. The analysis of the May sweeps continues with Part 2, story and tables on *Pages 60 and 61*.

Anheuser-Busch and Miller Brewing continued to increase share at the expense of other brewers in 1979. *See Page 4*.

Fox tv chairman sees a "point of no return" for the actors strike and is gearing up to produce for pay tv and home video markets. *See Page 6*.

Rums of Puerto Rico is taking a long-term look at the rum market and the revenues it brings to the island. *See Page 10*.

Marketers of 35mm cameras are turning to rebates, price reductions and styling changes in hopes of stemming sales declines. *See Page 12*.

ABC magazine audits still cause sparks. *See Page 14*.

BBDO's Allen Rosenshine and Norman Muse of Leo Burnett Co. are among those examining the creative picture at AD AGE Week. *See Page 20*.

Kitchens of Sara Lee account shifts to Benton & Bowles, Chicago, from New York. *See Page 36*.

Jack Honomichl looks at the U.S. auto industry—its current status and the events that led to the problems now facing the domestic car makers. *See Page 43*.

Jack. H. Grossman provides five checkpoints in marketing research that could help solve some sales or marketing problems. *See Page 51*.

Richard Douglas offers some financial tips on how to use a buying service. *See Page 51*.

Chasing the U.S. sports shoe market, Japan's Mizuno Corp., the world's second largest sporting goods marketer, plans a push through Curley-Bates Co. *See Page 54*.

With a predominantly vegetarian population in India and tradition-bound food habits, particularly in the major urban centers, the introduction of a soy product with its meatlike texture posed a special problem to marketers. *See Page 56*.

SmithKline agreed to sell off its stagnant Sea & Ski suncare line to satisfy government antitrust objections, but will keep its recently acquired Eclipse suncare brands. *See Page 60*.

The FTC gives a final okay for co-op ads in free community and suburban papers. *See Page 64*.

The director of the British National Consumer Council told a recent World Future Society meeting in Toronto that home video information systems now coming onto the market are beset with economic and technical problems that will delay consumers' acceptance of them. *See Page 69*.

Helena Rubinstein surfaces in new reports and picks a media buyer. *See Page 73*.

The Revlon Touch, a computer that analyzes beauty needs, is set for Bloomingdale's, New York, and department stores in Minneapolis and Los Angeles. *See Page 76*.

The recession and red ink at *Inside Sports* sends Washington Post Co. second-quarter net income down from a year ago. *See Page 76*.

Section 2

What are the popular spirits of 1980 and how are marketers positioning the brews to meet the challenges of the new decade? These and other questions are explored in Section 2/Liquor, Beer and Wine marketing beginning opposite Page 40.

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Vol. 51, No. 33—ADVERTISING AGE (ISSN 0001-8899) is published weekly, except semiweekly the third week in March, the second week in September at 740 Rush Street, Chicago, IL. 60611. Second-class postage paid at Chicago and additional mailing addresses.

Share of the beer market trends

	1970	1975	1976	1977	1978	1979
Anheuser-Busch	18.1%	24.9%	20.9%	25.4%	28.3%	30.4%
Miller	3.4	8.2	11.9	15.3	19.4	24.5
Schlitz	10.5	14.0	14.5	12.9	11.4	9.8
Coors	5.3	7.9	8.6	8.2	7.8	8.1
Pabst	8.3	7.9	8.7	8.1	7.5	7.1
Heileman	1.9	2.6	3.1	3.7	4.1	6.0
Olympia	4.3	4.0	4.2	4.0	3.9	4.0
Schaefer	4.3	3.5	3.1	2.8	2.2	1.8
Genesee	0.8	0.9	1.2	1.3	1.4	1.5
Pittsburgh	0.5	0.4	0.4	0.3	0.3	0.3
Total	57.5%	74.4%	76.7%	81.9%	86.2%	93.5%
Total Top 5 (1979)	45.6%	63.0%	64.7%	69.9%	74.4%	79.9%
Total (A-B & Miller)	21.5%	33.2%	32.8%	40.7%	47.7%	54.9%
Total (Schlitz, Coors, Pabst)	24.1%	29.8%	31.9%	29.2%	26.7%	25.0%
Total, 6th-10th companies	9.9%	11.4%	12.0%	12.0%	11.8%	13.6%

Source: Company records and *Impact* calculations

Leading imports—estimated '79 sales

Rank	Brand*	Country of Origin	1979 Sales (Million Gallons)	% of Import	% of Total U.S. Beer Sales
1	HEINEKEN	Netherlands	56	40.7%	1.08%
2	MOLSON	Canada	22	16.0	0.42
3	LABATT	Canada	14	10.2	0.27
4	DOS EQUIS	Mexico	7	5.1	0.13
5	BECK	Germany	6	4.4	0.12
6	GUINESS	Ireland	3	2.2	0.06
7	FOSTER	Australia	2	1.5	0.04
7	ST. PAULI GIRL	Germany	2	1.5	0.04
9	CARTA BLANCA	Mexico	2	1.5	0.04
10	MOOSEHEAD	Canada	2	1.5	0.04
	Total		116	84.2%	2.24%
	All imports		137.7	100.0%	2.65%

Source: Industry sources, *Impact* estimates

*Includes all brands imported by company

A-B, Miller brews continue to barrel ahead

NEW YORK—The startling market share growth of Anheuser-Busch and Philip Morris' Miller Brewing between 1970 and 1979 spells future bad news for smaller brewerics, a just-released beer study indicates.

The giant rivals last year accounted for a combined 55% share of the 171,800,000 barrel market, a gain of 34% over their 21% combined share in 1970, according to *Impact* newsletter's "American Beer Market Review & Forecast" edition.

In contrast, the next three largest brewers, Schlitz, Coors and Pabst, "only increased their combined share of the market since 1970 a bare 0.9% to 25%," the study notes.

■ With the industry's growth pegged at a moderate 3.4%, compared with 5.4% in 1977 and 4.3% in 1978, the study concludes that "growth of major brewers will have to be at the expense of other lesser brewers and will lead to an environment of product segmentation and proliferation. While the total number of brands will decrease as more smaller brewers close their doors, the number of brands controlled by major breweries will increase. In the 1980s, the name of the brewing game will be segmentation, advertising and marketing."

The study points out that while Miller Brewing still is enjoying better barrelage growth, "It appears that Anheuser-Busch has the greater strength because of its broad line of well-positioned brands. A-B, the nation's No. 1 brewer, markets Budweiser, Michelob, Michelob Light, Busch Premium, Busch Bavarian, Natural Light and is test marketing Wurzburger, an import. Miller Brewing, the nation's second largest brewer, has Miller High Life, Lite and Lowenbrau, and is experimenting with a German import, Munich Oktoberfest.

A-B's market share last year rose to 30.4% from 28.3% in 1978. Miller's rose sharply to 24.5%, compared with 19.4% the previous year. The Miller growth is even more dramatic when one considers that the brewery only had held a 3.4% market share when it was acquired by Philip Morris in 1970.

Miller's 1979 advertising outlay totaled $75,000,000, compared with $87,300,000 for A-B. The total invested by the industry for advertising last year was $370,000,000.

■ The study notes that imported beers, led by Heineken (Van Munching & Co.), surpassed malt liquors as the fifth largest of six beer categories in 1979. Imports shipped 4,400,000 barrels of beer to the U.S. last year, up 25.7% over the previous year.

Copies of the 60-page study, which contains more than 40 tables, are available at $75 each from Tasco Publishing Corp., 305 E. 53rd St., New York 10022. #